

Global Fixed Broadband Market 2017 Analysis, Opportunities and Growth Forecast To 2021

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PUNE, INDIA, February 17, 2017
/EINPresswire.com/ --

[Fixed Broadband Market](#) 2017

Executive Summary

Fibre access technologies finally capture dominant market share

Recently there was an important development for the broadband sector with the market share of fibre infrastructure lines finally overtaking DSL technologies as the largest on a global level.

The fixed broadband network is the infrastructure needed to meet the needs, both economic and societal, of the developed markets. In fact in many of these markets, wireless broadband and FttP are developing in a complementary and harmonious way. For the foreseeable future a significant part of regional and rural areas will have to rely on wireless broadband.

Many global leading organisations have now publicly acknowledged the enormous importance of well developed broadband infrastructure for a sustainable future in terms of the economy, society and environment. Despite this recognition, there are still citizens of the undeveloped world who do not have regular access to the Internet.

It is the countries where civil stability has taken a stronghold that we will see the most progress towards building sufficient ICT infrastructure – and it will be these same countries where we will see poverty decrease further. However countries without a stable society will not see any of that progress among the majority of their people. They lack the conditions and institutions that would allow for ICT and other developments to occur and create long-lasting change.

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In the developing markets, mobile broadband will be the only way to advance telecoms developments in markets which have little or no fixed infrastructure in place. These networks will not only be used for



telecoms – but even more importantly, for economic and social applications such e-commerce, m-payments, e-health, e-education and e-government

This growing penetration of fibre infrastructure will eventually lead to huge advancements in important sectors such as e-health. In countries with a clear policy for an advanced broadband infrastructure, such as a National Broadband Network, BuddeComm sees e-health emerging to allow us to enjoy advancements in medical technology at more affordable costs. On truly high-speed broadband networks, e-health is rapidly shaping up as one of the key killer apps.

Key developments:

- FttX held only a 22% market share of global broadband access technologies in 2013, but by 2016 this had increased to around 47% at the expense of DSL which is in decline.
- In 2015 a study by the ITU found that only 43% of the world's population had regular access to the Internet.
- By mid 2015 there were 148 countries which had a national broadband network plan or strategy in place.
- Fibre networks have become a key investment area and most international high-speed broadband network projects are now based around FttP.
- Global broadband prices are declining in many markets around the world, making it more affordable and more obtainable to the greater population.
- South Korea is the most penetrated broadband market in the world, with over 39% population penetration.
- South Korea also continues to offer some of the fastest speeds worldwide. Other countries demonstrating high speeds include: The Netherlands, Japan, Switzerland, Norway, Hong Kong, Belgium, Denmark, Sweden and Singapore.
- The Broadband Commission found that there was recent evidence that disparities in revenues and CAPEX were beginning to arise between the various players in the broadband sector.

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